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Global Agricultural Information Network

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Exporter Guide to the Hungarian Market

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Exporter Guide

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Report Highlights:

This report summarizes general economic and business conditions in Hungary as they pertain to U.S. exporters of food and agricultural products. Included are an overview of best products sales prospects, market trends, and Hungary's relative position in the broader EU market.

Executive Summary:

The Hungarian food distribution system has changed drastically in the last decade as hypermarkets and large shopping centers have become predominate. Hungarian consumers are now more quality conscious and market segmentation is creating new opportunities for high quality U.S. foods and beverages. International food processing companies and food retailers increasingly purchase non-EU commodities through centralized import divisions or from European distributors who are able to supply several Member Countries.

Section I. Market Overview

Political Overview

Located in the heart of Europe, Hungary is a stable democracy that has been a member of the European Union (EU) for nearly a decade. The location of this country of 10-million makes it important politically and economically to the Central and Eastern European region.

Parliamentary elections in April 2010 brought a Fidesz-KDNP (center-right) coalition back to power with a two-thirds majority (263 seats). Viktor Orban became Prime Minister. Joining the MSZP (59 seats) in opposition were the newly elected far-right Jobbik party (47 seats) and the Green party, Politics Can Be Different (LMP) (16 seats). There is one independent Member of Parliament. The Fidesz-dominated Parliament quickly launched an ambitious legislative agenda that re-wrote the Constitution, reduced the overall number of seats in Parliament and extended citizenship rights to ethnic Hungarians living beyond the country's present borders.

U.S. interests are focused on building on Hungary's already active cooperation in the global war on terror and improving its performance in NATO, both on the military and political levels. Hungary remains an important economic partner for the United States as it works to improve its investment climate and to tackle domestic economic reform. Hungary joined the U.S. Visa Waiver Program in 2008.

Macroeconomic situation and trends

In 2012, Hungary's gross domestic product (GDP) was HUF 28,048 billion (approx. \$124 billion) with a growth rate of about 1.5 percent. Per capita GDP in 2011 was \$12,545. Many analysts expect GDP to grow somewhat more slowly in 2013. The 27% value added tax imposed on domestic and imported products is among the world's highest.

Hungary's exports grew 3.6% and imports by 4.2% in 2012. Exports are mainly machinery, vehicles, food, beverages, tobacco, crude materials, manufactured goods, fuels and electric energy. Major imports are machinery, vehicles, manufactured goods, fuels and electric energy, food, beverages, and tobacco. Over three quarters of total exports are to other EU countries, especially Germany, Romania, Austria, Italy, France, and the UK. Over two thirds of imports are from other EU countries.

Hungary has seen more than \$98 billion in foreign direct investment (FDI) since 1989. Germany is the most significant investor with 22% of total FDI, followed by Austria (14%) and the Netherlands (13%). U.S. companies account for 4% of FDI.

In October 2008, the effects of the global financial crisis spilled over into Hungary. Years of high budget deficits and Hungary's high external debt levels negatively affected foreign exchange, government securities, and equity markets in Hungary. Since 2010, the government has passed a number of tax changes, such as reductions in personal income and business tax rates, in order to increase Hungary's regional competitiveness. However, some tax changes, such as the so-called "crisis taxes", however, have adversely affected businesses. The crisis taxes, along with more recent measures passed in 2012, target banking, energy, telecommunications, and large retail.

Agriculture in the economy

Agriculture (including forestry, game management and fish farming) accounted 4.7 percent of GDP, employed 5.1 percent of the labor force and produced 8.1 percent of export earnings in 2012. The \$3.4 billion agricultural and food trade surplus is important to Hungary's trade balance. After the very good crop year of 2011, agricultural production volume decreased 9.2% in 2012 due in part to drought. However, rocketing agricultural price index, 13.3 percent, partly compensated for lower crop volumes. Crop production decreased 15.8% and animal production grew 1.5% in 2012. Grain prices increased 19.2%, eroding profit margins in poultry and swine production.

As rural populations age, commercial agriculture faces increasing shortages of skilled labor. There are also major income differences between regions, and between urban and rural areas. While the per capita GDP is 70 percent above of the national average in Budapest, the per capita GDP is 30-40 percent under the average in depressed regions. The bigger the share of agriculture in the economy of the region, the lower the per capita GDP tends to be.

The majority of agricultural land belongs to non-farm owners or inactive, typically older, proprietors in a "patchwork" of small parcels. Many large fields are not even spatially divided among owners via survey (called "undivided common ownership"). This land ownership pattern was the outcome of Hungary's Restitution Program and Cooperative Restructuring Program in the early 1990's. For the most part, tenants who cultivate large tracts of agricultural land are corporations or by privatized agricultural cooperatives or state farms.

Agricultural land may only be owned by natural persons [vs. legal entities] in Hungary. This explains why 93 percent of large farms (above 300 ha) are covered by leases. Only private Hungarian citizens and EU citizens resident in Hungary and engaged in agricultural activity can purchase farmland, while others may lease it. Restrictions on foreigners buying land were scheduled to remain in force for seven years following EU membership. In 2010 the EU granted a three-year extension of this transitional period which expires by January 1, 2014. Agricultural land sale records indicate that less than 2 percent of land changes ownership annually. In practice, land ownership restrictions probably have little impact on Hungary's near-term agricultural production potential.

Hungary's weather and soil make it a great place to farm. Arable land and permanent crops account for 5 million ha, of which 210,000 ha are irrigated, 1.1 million ha are in pastures and 1.7 million ha are in forests. Major crops include wheat (1.1 million ha), corn (1.2 million ha) and oilseeds, sunflower and rapeseed (0.7 million ha). The country has long traditions in producing planting seeds, and in

horticulture (mostly fruits and wine). Animal production includes 3.7 million pigs and poultry flocks of 38 million. The number of cattle of all types is 705,000.

Agricultural policy overview

Agriculture is one of the few sectors of the European Union where there is a common policy. Agricultural policy is proposed by a supranational authority-the European Commission, agreed to or amended by agricultural ministers of EU member nations, and reviewed by the European Parliament. Historically, the EU's Common Agricultural Policy (CAP) has played a critical role in connecting very diverse European countries and, thus, has helped solidify national commitment to the EU.

Under the CAP, Hungarian farmers receive lower direct (area) payments than farmers in older EU member states (e.g. neighboring Austria). These direct payments, which are paid out of the EU budget, increased gradually through a ten year transition period and reached the level of the “old” EU-15 countries in 2013. The New Member States were allowed complement the direct area payments by a gradually increasing national “top-up” payments. Beyond the top-up, so-called New Member States are able to form national “envelopes” to spend more on their sensitive, underdeveloped or other “problem” areas of production.

While the CAP supports the grain-oilseed-fodder and dairy-beef sectors, Hungary’s poultry and swine sectors currently receive less government support than these sectors received prior EU membership. Differences in structural priorities between the EU and Hungary have presented challenges in the formation of the country’s agricultural policies.

The Hungarian government is in the middle of a financial (budgetary) crisis and has tried to substitute support payments with government guaranteed credit programs. However, banks do not seem to be especially receptive to these efforts in relation to farm credit.

In general Hungary is satisfied with the recent outcome of the agreement of the new CAP and its budget. Hungary is a net recipient under the CAP, pulling in more CAP money than is paid out. Hungary supports a strong, sustainable CAP, and multi-functional agriculture. Hungary does not back stronger Member State co-financing or “re-nationalizing” of the CAP. By voting for a more competitive system Hungary is against the degression of subsidies (by the size of the farm), volume limits on agricultural production (quotas).

Import requirements

As a member of the European Union, Hungary has adopted EU import rules and foods safety regulations. Agricultural products are subject to the standard EU import phytosanitary rules, quotas, duties and other provisions. Hungary’s national food legislation is in large part harmonized with the EU's food laws. For more information on the Food Standards and Regulations and Product Certification of the European Union, please refer to the [E70047](#) FAIRS Export Certificate Report.

SWOT analysis of US Export opportunities

Advantages	Challenges
After a period declining incomes, there is room to increase consumption	Domestic food processing is very competitive
Western consumption patterns are emerging	Competition from European producers with geographic, tariff, and regulatory/administrative advantages
There is growth potential in the development of retail sector, especially in suburban and rural areas	Slow increase of real incomes
Domestic industry needs certain ingredients	Image challenges for U.S. products (Hormone beef, GMOs)
EU membership facilitates the entry of new and small volume imports of US products through other countries' distributors	High transport costs
High number of experienced, multinational retailers	Multinational retail chains purchasing to serve EU-wide markets (less direct contact with Hungarian importers)
Innovative products and packaging are appreciated	Relatively small delivery volumes
Importers are open to new products and have been willing to participate in U.S. sponsored events	Hungarian consumers are unfamiliar with the value of many U.S. products

Section II. Exporter Business Tips

Local Business Customs

In the decade since Hungary joined the European Union, local business practices have changed considerably. Agricultural production, processing, distribution and trade have all seen consolidation and the emergence of large players. Landlocked Hungary has to compete with other Member States producers in the vast EU domestic market. As a result of consolidation and acquisitions, the number of Hungarian importers of U.S. raw and intermediary products has declined. Smaller firms have in many instances been replaced by international food processing companies serving multinational retail chains. One result is that imported food ingredients are increasingly purchased through their central import divisions outside of Hungary. (See www.american-foods.org for listings of major importers of American commodities in the EU.) Still, it is important to keep in contact with the Hungarian end users and retailers because local tastes and product uses can differ from other European countries.

General Consumer Tastes

Hungarian consumers have in some respects been converging with other EU consumers demographically and in terms of shopping patterns (urban buyer, purchasing in hyper/super market, for smaller families, aging populations, etc.). However, due to somewhat lower incomes and wide-spread availability of domestically produced foods, consumers and food marketers tend to emphasize fresh materials in cooking, avoidance of food additives, GMOs and “artificial looking” looking foodstuffs. The Hungarian government has also fed these sentiments by promoting a romantic image of traditional agriculture. The government also promotes local foods, for example, with very specific Geographic Indicators and “Made in Hungary” campaigns. Consumers gradually become more suspicious about import products, even if those from neighboring EU members.

Section III. Market Sector Structure and Trends

The Food Retail Sector

In recent years, Hungarian food and grocery retailers coped with a stagnant economy and decreasing purchasing power. Rising fuel prices, high (27 percent) VAT rates, and less disposable income, have made consumers price-conscious. However, the value of food retail sales in 2012 was \$15.9 billion, a 4 percent increase over 2011. The growth was attributed to increases of agricultural and food prices.

Share/Type of Retailer for the Fast Moving Consumer Goods (FMCG) (food, beverages, and household chemicals) (%)

Type of shop	2004	2012
Hypermarkets	21.8	26.2
Supermarkets	15.7	16.6
Domestic Chains	14.3	15.6
Independent shops	31.9	27.2
Markets	4.8	5.5
Other retail	11.5	8.9
Total	100	100

Source: Central Statistical Office of Hungary

Concentration in the grocery trade has continued over the last few years. By 2012, more than 59 percent of turnover was attributed to the five biggest companies. However, some well-known European retail chains have moved out of Hungary, such as Julius Meinl, Cora, Mach and Billa. The total number of food-oriented outlets decreased by 1 percent 2012. The construction of stores of over 300 sq. m was stopped in 2012 by the governments so-called, “Plaza Stop Act” and the number of new hypermarkets is effectively capped.

Hypermarkets bigger than 10,000 square meter include Tesco, Interspar and Auchan. Supermarket chains such as Spar, Match, and CBA are well known in the capital area and in bigger cities and entered to the hypermarket category through acquisitions. Supermarket size is typically 1,000-3,500 square

meters. Discount food stores (401-1,000 square meters) are the backbone of the everyday food shopping (Aldi, Lidl, Profi, Penny-Market, Plus, Real).

Grocery Retailer Market Shares

(Percentage of sales value, excluding sales tax)

	2008	2009	2010	2011	2012
Tesco-Globál Áruházak Zrt	16.1	16.3	16.9	17.2	17.1
CBA Kereskedelmi Kft	12.3	12.7	13.3	13.3	13.1
Coop Hungary Zrt	9.7	10.3	11.0	11.2	11.3
Spar Magyarország Kereskedelmi Kft	7.6	10.4	9.8	9.6	9.4
Auchan Magyarország Kft	6.0	6.1	6.2	6.4	8.2
Reál Hungária Élelmiszer Kft	6.0	6.1	6.3	6.3	6.0
Lidl Magyarország Kereskedelmi Bt	4.0	4.3	5.0	5.3	5.4
Penny Market Kft	3.8	3.8	3.9	4.1	4.0
Aldi Magyarország Élelmiszeripari Kereskedelmi Bt	0.5	1.0	1.3	1.6	1.8
Coop Csoport	1.0	1.2	1.0	0.9	0.9
Csemege-Match Kereskedelmi Zrt	1.3	1.2	1.0	1.0	0.9
Profi Magyarország Kereskedelmi Zrt	0.8	0.6	0.5	0.5	0.5
MOL Nyrt	0.4	0.5	0.4	0.4	0.4
Shell Hungary Zrt	0.4	0.4	0.4	0.4	0.3
OMV Hungaria Kft	0.3	0.3	0.3	0.3	0.3
Eni Hungaria Zrt	-	-	0.2	0.2	0.2
Lukoil Magyarország Kft	0.1	0.1	0.1	0.1	0.1
Avia International	0.0	0.0	0.0	0.0	0.0
Tom Market Franchise Hungary Kft	0.0	0.0	0.0	0.0	0.0
SEFT Trafik Kft	0.0	0.0	0.0	0.0	0.0
Magyar Hipermarket Kft	2.5	2.1	1.9	1.8	-
Agip Hungaria Rt	0.2	0.2	-	-	-
Plus Élelmiszer Diszkont Kft	2.2	-	-	-	-
Others	24.5	22.4	20.4	19.3	20.2

Source: Euromonitor International

The number of small convenience shops is decreasing and the startup and failure rates are high - about one third close annually. Market share for independent shops is decreasing while members of franchisees and chains stores are forecast to increase market share from 10 to 14 percent (source: Gfk Market Research).

Small gift and sweet shops also sell a variety of foreign wine and spirits, fancy dry fruits and nuts, sweets. Gift baskets of food are also commonly for sale in bigger food stores, particularly around

Christmas and Easter. Fancy food and spices shops, specialty beverages shops, pet shops etc. are also important distribution channels of imported commodities.

Most of the more than 900 gas stations in Hungary are also convenience stores. The size of these convenience shops varies from 200 - 1,300 square feet. According to a recent survey, 35-45 percent of shop sales are food and beverage items. Most of Hungary's ten major gas station companies run the shops themselves. Shell Hungary, however, has for years run its "Select" stores under a franchise partnership with CBA, a major domestic grocery chain.

There were 4.5 million internet subscriptions in Hungary (a country of just ten million people) in 2012, which represents a 32% annual increase over 2011. The internet is broadly used, not just for getting information and keeping in contact with friends via social media, but for all kinds of financial transactions and purchases. Internet penetration has just passed 60% (% of the total population aged 15-69) and over 2 million mobile internet subscriptions ensure access to the internet on-the-go. Smartphones and tablets are also popular.

Internet food retailing is expected to be a growth segment. According to a Webshop-Experts survey, the value of e-commerce increased 14 percent in 2012 to HUF 177 billion (\$784 million). A growing willingness to use bank cards for online transactions and growing confidence in established online brands will further enhance this distribution channel. Currently about 1.03 purchases are concluded per 100 website visits. The most popular items bought online are tools, household chemicals, books, auto and bike parts, and cosmetics. Price comparison sites and online coupons also help consumers to find the best sources for the items they need. Internet food retailing is getting an additional boost with Tesco's launch of its webshop in 2013.

The Hotel and Food Service Industry (HRI)

Catering sales were \$3.24 billion in 2012, a 0.2 percent drop compared to the previous year. The biggest growth rate within the HRI sector was in fast food, while workplace catering sales declined the most. Several international companies have franchise networks in Hungary, including McDonalds, Pizza Hut, Kentucky Fried Chicken, Subway, TGI Friday and Starbucks Coffee.

Foreign and "theme" restaurants offering ethnic food and beverages also appear to be growing faster than the restaurant sector in general. These restaurants use and sell imported ingredients and niche products, making them a good place to advertise new products and to educate consumers about new foods.

Hungary is visited by more than 5 million tourist (defined as spending more than 3 nights) annually. To help break into this segment, upper-tier hotels can be good partners for U.S. food exporters. Not only as hosts for promotional events but also as buyers of premium ingredients and beverages. Most hotel shops sell American products and hotel and catering trade opportunities are under-utilized. Hotels and restaurants mainly buy imported products from local distributors but their managers and chefs are good sources of information about customer preferences and quality and price expectations.

The Food Processing sector

The strength of Hungary's food processing sector is grounded in domestic production of inputs but nonetheless relied on crucial imported ingredients. Food processing is also vital to the country's trade balance. Western companies have invested in distilling, seed production, sugar production, soft drinks, vegetable oil processing, confectionary, pet food, snacks, and tobacco. Companies of these sectors are integrated into the EU-28 domestic market and have been through a concentration process in their ownership structure. However, some elements of the food processing sector are still made up of small- to mid-sized joint ventures with domestic majority ownership. Examples of this model include investment in the milling, baking, pasta, and poultry industries.

The increase in the number of companies and new production facilities, in tandem with the decline of domestic consumption, initially led to excess production capacity (sometimes over 30 percent above demand). Over capacity in turn increased the pressure to export. In 2012, nearly one-third of food industry sales were from exports but the export orientation is even higher for some sub-sectors such as canning, meat, poultry, and dairy industry.

The total food /beverages sector production is 120% of domestic demand, indicating a strong export orientation. The following table indicates that the share of imports in the supply of processed food (import penetration) is relative low. Imports are significant for sweets, confectionary and dairy products (need for a wide variety products in these sectors), and fruits/vegetable (need for out season products).

Food Processing Industry Sub-Sector	Export Orientation	Import Penetration
Meat Industry	33.3 %	5.4 %
Dairy	15.3 %	6.2 %
Poultry Processing	42.9 %	0.9 %
Fruit and Vegetable Processing	52.0 %	12.4 %
Brewing	0.7 %	3.0 %
Soft Drinks	8.2 %	2.5 %
Tobacco Industry	Negligible	2.0 %
Sweets and Confectionary	17.2 %	22.8 %
Wine	62.0 %	2.7 %
Feed Milling	23 %	52.0 %
Flour Milling	13.5 %	1.5 %

Source: Ag Office calculations based on Industry statistics

For many sub-sectors, consumer-oriented product imports are not high, but raw material imports may be considerable. Soybean and fishmeal import (protein sources used in animal feed milling), almonds and raisins import (sweets and confectionary), pork and tobacco all fall into this category.

The food processing industry purchases most of its raw materials from domestic sources, but imports of out-season or unavailable agricultural ingredients, non-food additives, and packaging materials and technologies, are vital.

Sporadic export sales opportunities for U.S. suppliers have occasionally occurred in recent years because of temporary domestic shortages (meat) or the limited availability of a given commodity or quality grade in Hungary (fruit juice concentrate, rice, tobacco, peanuts, fish, raisins, tree nuts, dried fruit etc.)

Section IV. Best Product Prospects for U.S. Agricultural and Food Exports

Product Category	2012 Market size	2012 Imports	5 year average annual imp. Growth	Key Constrains Over Market Development	Market Attractiveness for USA
Dried Fruit (incl. raisins) MT	47,400	7,532	0	Competition from cheaper suppliers from Turkey, Iran and other Asia	Consumption is growing. Good quality of California raisins and prunes are recognized by consumers
Rice (MT)	28,000	22,000	-4	Protected EU competitors and cheap Asian suppliers	
Seafood (MT)	16,800	16,800	1.4	Per capita consumption is still low. Consumers do not know quality differences	
Distilled Liquors (\$1,000)	745,000	54,133	-2.3		U.S. bourbon whiskey is trendy
Wine (1,000 HL)	2,200	152	2.8		Wine consumption is traditional and HRI needs high quality wine

Spices & Condiments (\$1,000)	52,000	21,440	3		Hypermarkets and American restaurants introduce new cuisine and spices
Fruit Juice Concentrates (\$ 1,000)	610,000	56,980	-1.7	Hungary is a major producer of temperate fruit juices	
Nuts incl. peanuts (\$1,000)	50,085	43,020	-1.8		California almonds dominate the market
Pet-food (MT)	689,300	43,358	-5	EU Veterinary regulations may limit imports. Domestic production increases.	Hungarians keep a lot of pets, and pet-food sales increase rapidly

Section V. Key Contacts and Further Information

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APPENDIX-STATISTICS

TABLE A: KEY TRADE & DEMOGRAPHIC INFORMATION	YEAR	VALUE
Agricultural Imports From All Countries (\$Mil)/U.S. Market Share (%)	2012	5,397 / 0.73%
Consumer Food Imports From All Countries (\$Mil)/U.S. Market Share (%)	2012	2,886 / 0.65%
Edible Fishery Imports From All Countries (\$Mil)/U.S. Market Share (%)	2012	68 / 0.5%
Total Population (Millions)/Annual Growth Rate (%)	2012	9.9 / -1.23%
Urban Population (Millions)/Annual Growth Rate (%)	2012	6.8 / -1.18%
Number of Major Metropolitan Areas	2012	1
Size of the Middle Class (Millions)/Growth Rate (%)	N/a	N/a
Per Capita Gross Domestic Product (U.S. Dollars)	2012	\$12,546
Unemployment Rate (%)	2012	10.9%
Per Capita Food Expenditures (incl. beverages/tobacco)(U.S. Dollars)	2012	\$911
Percent of Female Population Employed	2012	54.9%
Exchange Rate (US\$1 = HUF)	2012	225

TABLE B. CONSUMER FOOD & EDIBLE FISHERY PRODUCTS IMPORTS

Hungary Imports	Imports from the World			Imports from the US			U.S. Market Share
(In Millions of Dollars)	2010	2011	2012	2010	2011	2012	2012
CONSUMER-ORIENTED AGRIC.	2,795	3,267	2,886	22	22	20	1
Snack Foods (Excl. Nuts)	66	70	62	0	0	0	0
Breakfast Cereals &	20	30	29	1	1	1	3

Pancake Mix							
Red Meats, Fresh/Chilled/Fr ozen	276	361	405	0	0	0	0
Red Meats, Prepared/Preserv ed	30	36	33	0	0	0	0
Poultry Meat	24	34	18	0	0	0	0
Dairy Products (Excl. Cheese)	268	301	239	0	0	0	0
Cheese	132	147	122	0	0	0	0
Eggs & Products	21	27	27	2	2	2	10
Fresh Fruit	188	192	149	1	1	1	0
Fresh Vegetables	77	72	53	0	0	0	0
Processed Fruit & Vegetables	164	195	173	4	3	2	3
Fruit & Vegetable Juices	44	65	57	1	1	1	1
Nuts incl. Peanuts	41	50	43	2	2	2	5
Wine & Alc. Beverages	20	38	35	ng	ng	ng	0
Pet Foods (Dog & Cat Food)	72	77	66	1	1	1	1
Other Consumer- Oriented Products	204	257	236	10	11	10	4
FISH & SEAFOOD PRODUCTS	66	73	68	ng	ng	ng	0
AGRIC. PRODS. TOTAL	4,442	5,397	5,017	42	41	38	1
AGRIC., FISH & FOREST. TOTAL	4,971	5,982	5,543	43	43	39	1